

A Google Ads agency can't make good decisions with a login and a vague request for "more traffic." It needs to understand how your business makes money, which leads or sales are valuable, what you can fulfil, and how conversions are measured. The more useful context you provide before campaigns launch, the less time the agency spends guessing—and the more likely its recommendations will support real business results.

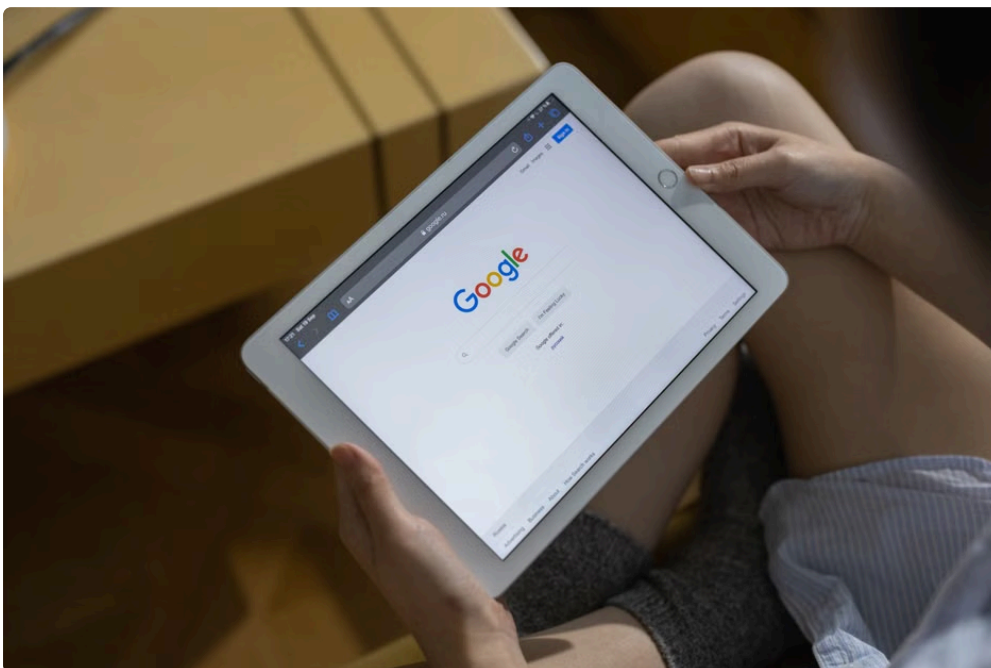
This guide explains what to share during onboarding, why it matters, and how to avoid common tracking and reporting problems. Use it as a practical **ppc onboarding checklist** whether you're hiring an agency for the first time or bringing order to an account that has been running for years.

Start with business outcomes, not traffic goals

"More clicks" and "more impressions" describe activity, not business success. Before discussing campaign structure or keywords, tell your agency what you want the advertising to accomplish. Are you looking for profitable online sales, qualified enquiries, bookings, store visits, or a steadier pipeline of sales opportunities?

Be specific about what a good result looks like. If the goal is lead generation, for example, do you need more enquiries, more sales-qualified leads, or more customers? Those outcomes are not interchangeable. A campaign can produce a large volume of form submissions and still [google ads conversion tracking](#) underperform if the sales team can't reach the leads or they don't fit your service.

Share the business measures you use to make decisions. These might include revenue, gross profit, booked appointments, closed deals, repeat purchases, or qualified opportunities. Your agency can then connect Google Ads activity to outcomes that matter to your business instead of treating low-cost clicks as the goal.



Explain your business context for ads

Campaigns don't run in a vacuum. Your agency needs the context behind the offer: what you sell, who buys it, why customers choose you, and what may affect demand. This is the **business context for ads**—the information that helps an agency decide what to promote, how to describe it, and which opportunities deserve priority.

Provide a short overview of your company, products or services, and business model. Include details such as:

- Your main products or services and which ones are most important to grow.
- Your ideal customers, including location, needs, and common buying triggers.
- What makes your business different from alternatives.
- Seasonal peaks, slow periods, and any upcoming launches or promotions.
- Capacity constraints, such as limited appointment slots or stock.
- Sales or fulfilment steps that happen after a click or enquiry.

For example, a business may want to promote a high-margin service but have limited capacity to take on new customers. Another may sell a wide product range but only want to acquire customers for certain categories. Without that context, an agency could drive demand that the company doesn't want—or can't serve.

Share pricing, margins, and what a customer is worth

A common gap in agency onboarding is the absence of commercial numbers. Sometimes the brief contains no pricing, retainer, ad spend, or CPA figures at all. Those numbers are not one-size-fits-all, and an agency shouldn't invent them. But it does need enough financial context to make sensible recommendations.

Share information you're comfortable providing, such as typical order value, average sale value, gross margin ranges, close rate, repeat purchase patterns, or the maximum cost you can tolerate for a new customer or qualified lead. If exact figures are sensitive, ranges or relative rankings can still help. For example, you could identify which products are high margin, which services are most profitable, and which leads are most likely to become customers.

This information is essential for understanding **profit margins for PPC**. A campaign's cost per conversion may look attractive but still be unprofitable if the sale has a low margin or a poor close rate. Conversely, a more expensive lead may make sense if it regularly becomes a high-value customer. The right target depends on the economics of your business—not a generic benchmark.

Clarify the planned ad spend and how flexible it is. Tell the agency whether the budget is fixed, can increase after results are proven, or needs to be split across specific products, locations, or seasons. If you already have a CPA target, explain how it was calculated and whether it refers to a lead, a qualified lead, a sale, or a new customer.

Define lead quality, not just lead volume

For lead-generation campaigns, the number of form submissions is only the beginning. Your agency needs to know what happens next: who follows up, how quickly they do it, and how your team decides whether an enquiry is worth pursuing.

Agree on a shared definition of lead quality. Useful distinctions might include:

- **Enquiry:** Someone submitted a form, called, or requested information.
- **Qualified lead:** The person fits your service area, budget, and customer criteria.
- **Opportunity:** Your team has had a meaningful conversation and identified a potential need.
- **Customer:** The lead has purchased, signed, or booked.

Tell the agency how leads are reviewed and what common disqualifiers look like. Are you receiving spam, job applications, requests outside your service area, or enquiries about services you don't offer? If the sales team already records lead status in a CRM, explain what fields and stages it uses. That information can help your agency assess whether campaigns are producing useful prospects rather than simply increasing lead volume.

Sort out measurement and tracking before increasing spend

Before campaigns are launched—or budgets are raised—confirm what counts as a conversion and how it is recorded. Tracking should reflect meaningful customer actions, not every interaction that happens to be easy to measure. A page view, button click, or time on site may be useful for analysis, but it should not automatically be treated as a sale or qualified lead.

Give the agency access to the relevant Google Ads account and a clear picture of the current setup. Ask it to review conversion actions, attribution settings, tags, call tracking, forms, and any other systems that record customer activity. If the business uses a CRM, explain how enquiries are captured and whether lead status or revenue can be matched back to the original advertising source.

Agree which events should be measured and who is responsible for each part of implementation. The agency may need support from your website developer, ecommerce platform owner, or internal marketing team. Make sure there is a plan to test the tracking before relying on the data. A reported conversion is only useful if it corresponds to a real action and is recorded consistently.

Also flag any recent website changes, tracking outages, or account migrations. Historical data can be misleading if conversion tracking changed midway through a reporting period. Measurement first, spend second: otherwise, you may pay to generate activity without knowing what it produced.

Prepare access, assets, and account history

Access is not a strategy, but it helps the agency understand what exists and what needs attention. Use appropriate account permissions rather than sharing passwords. Depending on your setup, the agency may need access to Google Ads, your website or ecommerce platform, analytics tools, a CRM, and reporting systems.

Gather the materials that explain your offer and give the agency a place to start:

- Brand guidelines, logos, product images, and approved messaging.
- Landing page URLs and any pages that should not be promoted.
- Customer FAQs, common objections, and sales-team feedback.
- Past campaign reports, account changes, and known performance issues.
- Relevant legal, industry, or brand restrictions.
- Details about competitors you care about—and why you consider them competitors.

Existing account history can be useful, but it needs context. If a campaign was paused because inventory ran out, a promotion ended, or a tracking problem occurred, say so. Otherwise, the agency may treat an unusual period as a reliable indication of performance.

Use this PPC onboarding checklist

The following checklist is a practical starting point. You don't need every answer fully documented before the first meeting, but you should know who can provide the missing information and when.

Area	What to share	Why it matters
Business goals	Target outcomes, priorities, and how success is judged	Keeps campaign decisions tied to business results
Offer and audience	Products, services, ideal customers, differentiators, and locations	Helps shape targeting and messaging
Commercial details	Budget, pricing, margin ranges, sales value, and capacity	Supports realistic targets and budget decisions
Lead quality	Qualification criteria, disqualifiers, sales stages, and follow-up process	Separates useful enquiries from raw lead volume
Measurement	Conversion	

definitions, tracking setup, CRM process, and data owners Helps verify what advertising actually produces Access and assets Account permissions, creative materials, landing pages, and history Reduces setup delays and avoids unnecessary guesswork Working rhythm Approvers, meeting schedule, reporting preferences, and escalation contacts Makes decisions and implementation easier

Set expectations for communication and decisions

Onboarding should establish how you and the agency will work together—not just which accounts it can access. Decide who approves ads, landing page changes, budgets, and tracking updates. Agree on a realistic reporting cadence and what the report should help you decide.

A good report does more than present tables and screenshots. It explains what changed, what the data suggests, what remains uncertain, and what action the team recommends next. Ask the agency to connect its findings to a business question: “What should we do differently next week?” That question keeps reviews focused on decisions rather than a tour of dashboard numbers.

It also helps to agree how tests will be run. Changing several major variables at once can make it difficult to tell what caused a result. Ask the agency to explain what it is testing, what it expects to learn, and how long it needs before drawing a conclusion.

Bring an honest picture, not a perfect one

You do not need flawless data, polished processes, or a complete marketing plan to begin onboarding. You do need to be candid about what is known, what is uncertain, and what is missing. If margins are still being calculated, conversion tracking has not been tested, or sales follow-up is inconsistent, say so. Those are problems to solve together—not details to hide until results disappoint.

Agencies such as ClickSlice (clickslice.co.uk) or a creative partner such as Zeka Design (Zeka Graphic) will be better placed to contribute when they understand the business behind the campaign. The brand and account details matter, but so do profitability, lead handling, customer experience, and measurement. Provide that foundation, and your Google Ads agency can focus its attention on improving outcomes rather than trying to decode the business from clicks alone.



Bottom line

Give your agency a clear view of your goals, customers, offer, commercial limits, lead-quality standards, and tracking setup. Share pricing, budget, and profitability information—or explain what you can share in ranges—so recommendations reflect your economics. Most importantly, make sure both sides agree on what success means and how it will be measured.

A strong **ppc onboarding checklist** is not paperwork for its own sake. It is a way to make better decisions, protect budget, and build campaigns around outcomes your business actually values.